



Appendix
A

**Volunteers:
Recruiting & Managing**

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1. Before you start recruiting

If you haven't involved volunteers in your organisation before, or you're thinking about starting a volunteer programme or project, this guide covers some of the key things you need to think about.

IDENTIFY THE NEED

A key starting point is to identify how you plan to engage volunteers in your organisation. You may already have some ideas for volunteer roles in mind, but there might be others you had not previously thought of.

Ask the following questions:

- What is the function of volunteers and what tasks are volunteers suited to?
- What skills and experience would we like volunteers to bring to our organisation to help its work?
- What benefits and skills can we offer that might encourage people to volunteer?

INVOLVE STAFF AND OTHER STAKEHOLDERS

To ensure your plans for a volunteer programme aren't going to fall at the starting gate, from the very beginning consult with your organisation's trustees and relevant committees, as well as staff and any existing volunteers. Getting them on side is vital to the success of the programme.

Encourage other stakeholders in your organisation to recognise and support the need to set up a volunteer programme. Some staff may be sceptical about the value that volunteers could make to your organisation, or they may be afraid that volunteers will be used to replace paid posts. At an early stage organise a meeting to discuss the issues and where people can express their concerns. Demonstrate to them how volunteers will benefit them, not just to the organisation, as well as visitors and the wider community too.

Developing a volunteer policy for your organisation could help you to articulate your reasons for involving volunteers and your vision for how this will work and align with the mission and objectives of your organisation (see Developing a Volunteer Policy below).

CONSIDER PRACTICAL ISSUES

Look at the space and equipment available at your site. Volunteers will need space to work in, and may need access to phones and computers or wet weather gear and outdoor equipment depending on the role you need them to carry out. Bringing volunteers into cramped accommodation can cause friction with existing staff, so ensure that you can accommodate the number of volunteers that you plan to recruit. Equally, volunteers completing outdoor tasks need to be adequately supervised and safe.

Two key points to consider are:

- Who will manage the volunteers on a daily basis?
- Will other staff be involved in taking care of volunteers?

DESIGN A VOLUNTEER FRAMEWORK

You will probably find it helpful to design a framework for your volunteer programme. This may include a volunteer policy or handbook, which will inform staff and volunteers how volunteers will be involved at an operational level, including:

- Background information about the organisation and the role of volunteers
- Relevant policies and procedures related to volunteer expenses, health and safety, insurance cover, monitoring and evaluation
- Information about the support and supervision arrangements that the volunteer will receive, including training and induction processes

BE AWARE OF COSTS

Volunteers should not be left out-of-pocket for any volunteering activity they carry out, not least because they're giving their private time to your organisation for free. Some volunteers will choose not to claim, but expenses should be offered for pre agreed tasks. Set up an expenses budget so that you can reimburse individual volunteers for costs associated with volunteering (see the section Managing: Expenses below).

You will also need to consider any other costs associated with your volunteers, including:

- Training
- Publicity materials for recruiting
- The cost of staff time for administration (e.g. processing applications, producing recruitment materials, contacting applicants etc.)

- Cost of staff time to manage volunteers
- How you will reward and recognise the contribution volunteers make

SCHEDULE YOUR TIME

All volunteers will require some level of support and management. You will probably need one person to be the main point of contact or lead volunteer coordinator or manager. This can be a skilled and complex role, which could be taken on by a member of staff or a volunteer depending on the number of volunteers they would be expected to manage. It is also important your volunteers have a sole point of contact within the organisation regardless of the department they work in.

CHECK THAT YOUR PROGRAMME IS SUSTAINABLE

If your project is time limited or you have a limited amount of funding consider at the beginning of the project:

- a) How you will make it sustainable?
- b) What you will do when/if it comes to an end?

Good volunteer management includes being open and clear with volunteers about how long the project is funded for and what might happen to their role at the end. It's important to have these discussions early so that volunteers know what to expect.

2. Developing a Volunteer Policy

A volunteer policy is a framework for a volunteer programme. It helps define the role of volunteers within the organisation, and how they can expect to be treated.

The benefits of having a policy:

- It demonstrates your organisation's commitment to its volunteer programme and its individual volunteers. Having a policy demonstrates that care and thought have gone into your volunteer programme.
- It ensures consistency and that all volunteers are treated equally and fairly. Being able to refer to a written policy ensures that decisions do not have to be made on an ad hoc basis.
- It clarifies the role of volunteers as separate to that of staff. Limits and boundaries can be set in terms of volunteer roles and responsibilities and how volunteers are recruited, managed and supervised by paid staff, as well as a managed end to the volunteering experience.
- It allows volunteers to know where they stand; it offers some security, in that they know how they can expect to be treated, and where they can turn to if they feel that things are going wrong.
- It helps ensure that paid staff, senior management and trustees fully understand why volunteers are involved, and what role they have within the organisation.
- It can also be used to explain some of the perks and benefits of volunteering. These don't need to be financial, but depending on your site you might want to offer things such as preferential ticketing for events, free entry for family members or special events for volunteers.

If your organisation has not yet started to work with volunteers, creating a policy is the ideal starting point to consider exactly how you will involve them in your work, as it encompasses everything from recruitment to supervision and dealing with any problems that may arise. You should consult as widely as possible with volunteers and staff at all levels of the organisation when developing your policy.

Things to cover in your policy:

A statement on why your organisation involves volunteers

Set out the principles behind your decision to involve volunteers, how it will benefit the organisation and the wider community, as well as the volunteers themselves.

Definition of volunteering

NCVO (formerly Volunteering England) defines volunteering as, ‘any activity that involves spending time, unpaid, doing something that aims to benefit the environment or someone (individuals or groups) other than, or in addition to, close relatives’.

Scope of volunteering

A broad statement on the range of activities you’re offering, where volunteering fits into the organisation and the boundaries between volunteering and paid responsibilities.

If your organisation also provides internships, work placements or other unpaid schemes it should be made clear whether, and to what extent, individuals on these schemes are covered by your volunteering policy, or whether there are other relevant policies to cover those.

Commitment to diversity

State how volunteers from a range of backgrounds will be encouraged, welcomed and supported as volunteers at your organisation.

Responsibilities of the organisation towards volunteers

General statements covering induction, training, support and supervision, etc. ensure that there is a common understanding, common standards of practice across the organisation and that volunteers are effectively included as active participants in your organisation.

Responsibilities of volunteers

The standards of professionalism you require from volunteers, for example in relation to behaviour, dress code, time-keeping, reporting requirements, honesty, confidentiality etc.

Recruitment and Screening

The steps involved in your recruitment and selection process, including developing role profiles, interviewing, considering if references are or DBS are required and saying “no thank you”. Include what happens if volunteers are

considered unsuitable for a particular role at both interview stage, and if they need to be asked to leave later on in their time with you.

Other relevant information

List your organisation's policies that include volunteers; for example, equal opportunities, health and safety, confidentiality, data protection, policy/procedures for reclaiming expenses, and details of insurance cover (including any limitations or conditions on the cover provided).

Settling disputes

Procedures for disputes or differences. This demonstrates that your organisation has a commitment to listening to its volunteers and settling disputes quickly and amicably. Some organisations have a short policy that refers to other documents for more details; for example, a separate document might have more information on Complaint Handling or Health and Safety.

Ensure that your policy reflects the size and nature of your organisation. It is important to have a proportionate level of formality so as not to put potential volunteers off volunteering for the organisation.

Once your policy is complete it should be communicated to staff and volunteers throughout your organisation.

The policy should be reviewed regularly, at least annually, to ensure it remains current.

3. Recruiting

The number of volunteers you recruit should reflect the number of roles you have identified would benefit the work of your organisation, as well as the number of people needed for each particular role. Over recruiting will leave some enthusiastic volunteers feeling under used, unvalued and bored, while under recruiting could see your volunteers being overstretched and stressed as they find themselves trying to cover too many tasks.

People are more likely to volunteer if specific skills development is offered, e.g. practical experience or training. Your organisation might provide its volunteers with skills development in some of the following areas:

- Event planning and management
- Basic administration and cash handling
- Heritage skills – this could include things like research and archiving or more practical outdoor skills like grounds maintenance or gardening
- Creative skills
- Fundraising skills

Volunteer role descriptions

Volunteers come from a diverse range of backgrounds. While some people will welcome volunteering opportunities around the history and heritage of your site, students and recent graduates seek marketing, events management and conservation opportunities and a wide range of older people might be more interested in stewarding and more specialist tasks, such as gardening.

Write outlines, or descriptions, for each type of volunteer role for which you plan to recruit. Remember, this is not the same as a Job Description for a paid member of staff, volunteers are not accountable in the same way as a paid member of staff and they should not feel bound by a role description. The descriptions should be consistent across your organisation and comply with your volunteer policies (see Developing a Volunteer Policy above). Try and strike a more informal tone with volunteer role descriptions and avoid phrases often seen in job descriptions for paid roles such as 'essential requirements'. Role descriptions must be kept on file for reference with each volunteer's agreement.

Role descriptions:

- Give more information to the volunteer than may be possible to convey in the interview
- Allow you to show where the volunteer's work fits in with the work of the organisation
- Offer a list of tasks so the volunteer can compare these with their own skills and expectations
- Describe the intended outcome of the work
- Help others understand how the voluntary role applies to/affects their own

A role description should include:

- Title of role
- Objective(s) of role
- A broad outline of tasks and activities to be undertaken
- The name of the person who the volunteer reports to
- Location and work hours
- How the role fits in with the work of the organisation
- Expectations of behaviour and dress (if appropriate)
- Type of person the role would suit, for example someone who likes working outdoors or someone who prefers working with a team
- Some volunteer roles will have specific requirements, for example a certain level of physical fitness or basic numeracy. This should be included in the role description but try to avoid phrases such as 'essential requirements'. Instead, aim for a more informal approach.

WRITING AN ADVERT

Using the Role Description, write a positive, exciting 'advert'.

Inspire the right people to respond by explaining (in reader-friendly language):

- What the organisation does and what cause or group of people it benefits
- The range of volunteer opportunities that exist
- The difference a volunteer can make to the cause or the people who are supported
- What the volunteer can gain from working with the organisation
- How prospective volunteers can find out more

Here's a real example:

Audley End (English Heritage)
Explainer Volunteer Role Description

WHY DOES ENGLISH HERITAGE NEED MY SUPPORT?

We are looking for people who want to be part of an expanding team of enthusiastic volunteers who help bring Audley End to life for visitors and enhance the visitor experience.

WHERE WILL I BE BASED?

Audley End House and Gardens Saffron Walden
Essex
CB11 4JF

WHAT WILL I BE DOING?

The role is all about people. You will actively engage with visitors: providing information about the history of the house, answering questions and giving a brief orientation of the rooms. You will need to maintain a level of visitor supervision whilst helping with the security and safety of the house, including evacuation.

HOW MUCH TIME WILL I BE EXPECTED TO GIVE?

Sessions run from 11am to 5pm, every day of the week from March to November with flexible sign-up to suit your availability.

There is also an opportunity to volunteer through the winter, at the weekends in the service wing and by meeting and greeting visitors and at special events. These sessions are from 10.30am to 2.30pm.

WHAT SKILLS, QUALITIES AND EXPERIENCE DO I NEED?

This is a great opportunity to learn new skills. We are looking for friendly enthusiastic communicators who enjoy meeting people from all walks of life, are keen to learn about the history of Audley End and share this knowledge with our visitors.

WHAT SUPPORT AND TRAINING WILL I RECEIVE?

In preparation for this role you will need to develop an understanding of the history of the site and gardens, together with significant features and artefacts. Full training will be provided and will include:

- Familiarisation with site and staff.
- Health and safety training.
- Role-specific training with relevant staff, including conducting guided tours if required.
- English Heritage customer service training.
- Two-way radio training.

WHAT WILL ENGLISH HERITAGE EXPECT FROM ME?

- To be the friendly face of English Heritage and deliver excellent customer service.
- To be reliable in attendance and dependable.
- Help us maintain the highest standards of presentation at our sites and properties.
- To wear English Heritage volunteer uniform where provided.
- Help us protect our properties and collections by understanding and following our security and safety procedures.
- Maintain good working relationships with staff, other volunteers and members of the public.
- Attend appropriate training and learn about the work of English Heritage.
- Observe organisational policy and procedures.
- Safeguard confidential information about English Heritage and let us know about anything relating to your role or the work of English Heritage that you think might be controversial.
- Any documentary or other material (including any copyright applying thereto) you are provided with or created by you in respect of your volunteering will be the property and copyright of English Heritage (unless otherwise agreed in writing).

What can I expect from English Heritage?

- A welcoming and enjoyable experience.
- To be treated fairly and with respect.
- Recognition and appreciation for your contribution.
- A full induction and training programme with on-going support.
- A volunteer pass allowing free entry to English Heritage properties is available on completion of 60 hours and four months of volunteering.
- Reimbursement of reasonable local travel costs between home and volunteering location within agreed limits.
- A certificate to demonstrate work carried out for English Heritage is available on request to show future employers or further education providers.
- You will be covered by English Heritage's own indemnity arrangements in respect of all liabilities that may result from your appointment as a volunteer.

Marketing your opportunities

The next step is to get your advert out in places where potential volunteers might see it. There are a lot of ways to advertise for volunteers, including:

- Word-of-mouth referrals
- Leaflets and other printed media
- Your local volunteer centre (see links below)
- Organising or speaking at events during volunteers' week (see links below)
- Local press and radio adverts
- Your organisation's website
- Local residents forums
- Volunteer recruitment websites (see links below)
- Ask people who are already connected to your organisation if they would like to volunteer, e.g. trustees, donors or even friends and family of employees.
- Local community organisation: gardening clubs, libraries, social clubs, Young Farmers, the Women's Institute, Scouts and Guides, organisations working with people with learning difficulties
- Further Education colleges
- Universities
- Some popular food outlets, check permission first but depending on the type of volunteer you want to attract e.g. young fast food non chain places can be a good option

Whatever method you use to promote and market your opportunities, your local Volunteer Centre is a great source of support and will give you free access to the UK's largest online volunteering website, Do-it. Create advertising which is specific to the roles for which you are recruiting. It may result in fewer responses but they will be more suitable and this will save you time in the long run. Speculative, non-specific advertising is likely to result in responses from a larger number of less suitable people. You will need to respond to everyone who contacts you and this can be very time consuming.

Online methods of recruitment can be especially attractive to younger people. Examples of online approaches to encouraging people into volunteering can be found at Vinspired (see Useful links).

Selection

The selection process will be dictated by the prospective volunteer role's level of responsibility. In some cases, a simple informal chat about the organisation and work will be sufficient. In others, a formal interview with several members of staff and references will be needed. Working with children or vulnerable adults will also mean security checks (see the section on DBS checks below).

Applications

A simple application form ensures the recruitment of volunteers is taking account of equal opportunities and diversity policy. Where appropriate, provide different languages or inclusive images in your advert. Be ready to have an informal chat on the phone.

You also need to be conscious about accessibility for people with disabilities, so printed adverts/leaflets could be provided in Large Print.

Asylum seekers, volunteers from overseas and ex-offenders are allowed to volunteer. If necessary, appropriate legal guidance should be sought from one of the national centres.

Meeting the candidates

An important part of the recruitment process is meeting the potential volunteers. Calling this an 'interview' can be off putting to many people, and depending on the type of volunteer role you are recruiting you may want to ask candidates to come for an 'informal discussion' rather than an 'interview'.

Think carefully about how the potential volunteer will feel during the experience. Some may never have had an interview before, or may have had bad interview experiences in the past. Give them clear directions about how to find the site and where to come when they arrive. Other things to consider are:

- Where will you hold the discussion? The café at a quiet time may be a less intimidating location than a quiet office or meeting room.
- How is the room set out? If you do need to hold the meeting in a more formal room, it is better to position the chairs in a circle around the table rather than have interviewers seated in a row opposite the candidate.
- How many people will be present? For a volunteer, a panel of six interviewers could be very intimidating. Keep the number of people as small as possible.
- Welcoming the candidate – don't keep them waiting, tell them where they can find toilets and offer them a drink.
- Emphasise to the candidate that the meeting is informal, and is an opportunity for them to find out about the organisation and the volunteer tasks as well as for you to find out about them and their expectations for volunteering. It should be a two-way discussion.
- Try to avoid making too many notes as this can be off putting. Explain that any notes you do make are simply to help your memory later.

The great temptation in interviewing is for the interviewer to talk too much about the organisation and not leave time for the potential volunteer to talk about themselves. What you really want to find out is whether the interviewee has the attitude, experience (or willingness to learn) and basic skills to suit the role.

A simple 'person specification' can be a useful template for the interview. A second is an exploration of why the applicant wants to volunteer. Motivations might include:

- a belief in the organisation's cause
- wanting to use skills and give something back
- trying out or learning new skills
- (if the person is older or unemployed) to keep active
- gaining experience in a field of activity they hope to enter
- social contact and meeting people

Keeping a record of the answers is a demonstration of good interview practice and helps reassure the interviewee that you value their time and interest.

Make sure the volunteer role or roles are understood and give time for the applicant to raise any questions or concerns. Doing this will help to bring the interview to an end.

It's also important that you're ready to explain any requirements that need to be met before appointment and the support that will be available.

Appointment and induction

Once you have decided that the applicant has the necessary attributes and actual or potential skills for the volunteer role, the next step is to contact them and fix a provisional start date and induction dates.

Ensure that you personally contact any unsuccessful candidates and give them meaningful feedback. It can be very demoralising not to hear from a venue after an interview and will leave the individual with a negative impression of your venue. Whilst it is not a pleasant task, people generally appreciate you taking the time to contact them.

While role descriptions are essential, avoid entering into a contract with your volunteers – remember they are not the same as paid employees and there is a clear difference in legal terms. For more advice on this, please see section **Treating volunteers appropriately below.**

Provide an unsigned written agreement that describes “expectations” rather than obligations. Build a good rapport with your volunteers, explain the tasks you would like them to undertake and discuss with them their availability. Consider shifts of 3-4 hours. If a volunteer is happy to be on site for longer consider offering lunch or discounts in the café or shop.

Discuss with volunteers your expectations around how long you would like them to be on site, but bear in mind as a volunteer is not an employee, legally they can leave at any time, establishing a good relationship early on will help your volunteers to remain committed to the task and your site. A set trial period is helpful for both parties, the volunteer may not meet the role's requirements or they may decide volunteering is not for them.

You should design an induction process for new volunteers which helps them integrate into the organisation. Introduce them to key staff members and other volunteers, show them around the whole site and give them maps or plans to take away with them, explain health and safety measures and ensure they know who to speak to if they have questions or need help. Depending on the role, you will need to give task specific training and ensure the volunteer has all of the equipment and materials they need.

References

References must be sought for volunteers, however small your venue or the role recruited for. However, unlike employee references, you won't need to ask for in-depth details, such as the number of sick days they took with an employer, whether they've been subject to disciplinary action or their reasons for leaving. You want to be sure your volunteers are who they say they are and that they will bring the right attitude and attributes to the role.

Two referees are adequate, with at least one being a previous/current employer if possible, while the other can be a character reference from anyone who isn't a family member. In the first instance, a simple letter or email from referees is enough, but talking to them by phone is also a good idea, as this allows you to probe a little deeper and ask about the applicant's capacity to work in a team, their flexibility and their ability to represent your organisation in a positive way.

Check the visas of applicants who are from outside the European Economic Region to see if they are legally allowed to volunteer. If you need further guidance your local volunteer centre should be able to help you. See the Useful Links at the end of this document.

Health questionnaire

During the recruitment process, take the applicant through a set of respectfully worded questions regarding their overall health. The reason for doing this is to ensure that no volunteer is given duties for which they are physically or psychologically unsuited (e.g. if they have a back problem and find standing for any length of time painful, you would not to ask them to steward an area where they can't sit down when needed). Include this questionnaire in your volunteer recruitment process, no matter what the volunteer role may be. This way, both parties are informed from the start, and both role and volunteer are well matched up. You might be able to offer a recruit a different or adapted version of the role in which a particular health issue will not be a challenge for them.

Ensure that your health questionnaire does not discriminate against people who are frail due to age or dealing with mental health problems (volunteering has proved to be a valuable way for people with depression to rebuild lost confidence). They too have skills and talents that will benefit your venue. Considerable sensitivity is required, as with disability, so contact the relevant organisations for current advice if you are unsure about the wording of your questionnaire (see Useful links below).

DBS checks

Organisations that involve volunteers need to ensure they have a robust approach to safeguarding in place. They should also consider what level of safeguarding is proportionate to the activities their volunteers are involved in.

The Disclosure and Barring Service (DBS) helps employers make safer recruitment decisions and prevent unsuitable people from working with vulnerable groups, including children. It replaces the Criminal Records Bureau (CRB) and Independent Safeguarding Authority (ISA).

Turning applicants down

You may decide that the applicant is not suitable for the volunteer role available. It's important to tell the applicant the reasons for not accepting them as a volunteer and to offer constructive feedback. It is important to be tactful in your approach as you may have decided you need volunteers for other roles in the future. Reasons for turning down an applicant might be that you feel that they simply won't fit naturally and quickly into the venue's existing volunteer/staff team, or that they don't have the exact skill set you need for that particular role. You might suggest that they apply instead for a different volunteer role you have available, if you feel they would be better suited to it. Suggesting that the nearest Volunteer Centre may have more suitable volunteer roles may ease the blow of rejection.

The applicant may decide that they do not want to volunteer for your organisation after all. In this case, you might want to ask the applicant for their reasons. This insight may prove helpful for future recruitment activity.

If you find yourself with more good applicants than volunteer openings, keep a database of people interested in volunteering (including some information on their skills) and send all new opportunities to this list.

4. Managing volunteers

Good Practice overview

- A dedicated person to lead on the programme and to be there on a day to day basis to trouble-shoot, support and mentor is important
- A training programme before volunteers are allowed to work on site
- DBS checks are necessary if volunteers have access to children and vulnerable adults
- A volunteer policy
- A volunteer 'contract' or agreement
- A volunteer handbook
- Support from outside agencies to deliver qualifications and awards

Role of the volunteer coordinator/manager

In most organisations volunteers are often managed or coordinated by a volunteer coordinator or manager. Titles vary and often the people recruiting and supporting volunteers may be volunteers themselves (if volunteers are managing volunteers they may require training and support).

For some people, volunteer management may be part of their role already. If you are asking a member of staff to take on this role in the organisation then you should consider what training they may require to take on the role and the costs associated with this. It may also impact on the time they are able to spend on other work and they may need additional support.

If you are intending to recruit a new post, then you will need to factor this into any funding bids for your volunteer programme.

Managers of volunteers and volunteer coordinators can contact the Association of Volunteer Managers (AVM), which is an independent body that aims to support, represent and champion people who manage volunteers in England regardless of field, discipline or sector. i-volunteer is a social network that connects volunteers, charities and volunteer managers across the UK. Membership is free. The UK Volunteer Programme Manager Forum (UKVPM) is an email discussion network. To join, visit the home page and follow the prompts.

SUPPORT AND SUPERVISION

Volunteers in any situation should be given adequate support to enable them to carry out tasks efficiently and with confidence. Support can be defined as 'person-centred' management and supervision as 'work-centred' management. Both are essential in risk management.

To support volunteers it's vital for a manager to really get to know them. Take time to understand what they find satisfying about volunteering and any concerns they may have about the role or the organisation. Volunteers do get bored and they have other things going on in their lives. With a large team, finding the time to talk to each individual or group may be difficult, but it's vital that you give your volunteers opportunities for giving and receiving feedback on their work. There are different ways of getting feedback from your volunteers, including questionnaires, interviews and focus groups.

Understanding your volunteers will help you to:

- Revise roles to ensure they are still relevant and valuable
- Provide new opportunities for keeping volunteers involved and motivated
- Enable you to continually improve how volunteers are organised

Supervision should be structured and formal, an opportunity to examine how the volunteer is carrying out the duties of their role in relation to previously agreed standards and targets. Each supervision session should conclude with a plan for future action. Keep records of issues and decisions made during supervision as these will be useful for tracking problems and progress.

Annual reviews can be one way of identifying how volunteers feel about their roles, their individual performance and career development within the organisation. In order for reviews to be effective both the volunteer and the reviewer need to make the most of the opportunity for a full and open discussion.

The results of the review should be documented and remain confidential to the volunteer and reviewer.

A review should seek to address the following questions:

- Since our last review how are you finding your volunteering?
- What do you think has gone well? Is there anything you are proud of?
- What has not gone well? How do you think it could have been done differently?
- Is there anything we could be doing to make your role easier/better?
- Is there any training you think would help you in your role?

- Can you see other areas of involvement within the organisation that you would like to try?
- Do you have any personal goals for the future that volunteering could help you to achieve?

Remember that your volunteer role descriptions don't need to be written in stone. They can be adapted according to the individual's capabilities and needs. Don't forget to review the role or task description on a regular basis with the volunteer. If their role changes over time, then the role or task description can be modified to reflect this.

TRAINING

Induction training

Regardless of the role, every new volunteer should have some type of induction. A good induction ensures volunteers are able to contribute quickly and feel part of the organisation right from the start. Induction can be given to an individual or a group, but it should take place as soon as possible following the volunteer's 'appointment'.

Part 1:

- Introduce them to other staff and volunteers
- Show them around the building
- Explain who they can go to if they have any questions or problems
- Show them where they will be sitting and where they can find any equipment they need
- Let them know about breaks
- Explain how to claim expenses
- Explain your organisation's policy on volunteers using telephones or accessing the internet for their own use
- Ask them to shadow other experienced volunteers or paid members of staff

Give the new volunteers time to absorb this information and encourage them to ask you about anything they don't fully understand. On a different day, perhaps over a number of days, you'll provide the rest of the induction training, which focuses on providing them with more formal information that affects their role.

Part 2:

Now it's time to take new volunteers through policies and procedures.

These could include:

- Your organisation's policies and procedures (e.g. equal opportunities, health and safety, risk assessments etc.)
- The history, ethos and structure of the organisation
- How to engage positively with visitors
- Equality, diversity and disability awareness
- Health and safety
- How to deal with visitors' complaints and areas of concern
- The role and responsibilities of their 'volunteer agreement'

Provide the induction information in a handbook or pack for each volunteer to keep.

The Museum of London provides free downloadable guides to help heritage organisations provide in-house training for volunteers, including Customer Care, Disability Awareness and Working Safely with Children (see Useful links below).

ONGOING TRAINING

A good volunteer programme that keeps its volunteers feeling valued, supported and engaged provides them all with ongoing opportunities to learn something new. In general terms these opportunities might include presentations by in-house or guest experts, or 'ideas shopping' field trips to similar venues.

At the other end of the scale, your volunteer plan might include creating roles that require in-depth specialist training on a particular subject or for a specific skill. Specialised training might be provided on or off your site by staff with the right expertise and knowledge, or by external trainers. Some of this training might be offered to volunteers with accreditation.

Your annual volunteer training budget should include trainer fees, volunteer travel costs to courses and accreditation costs.

Volunteer roles requiring specialist training might include:

- Interviewing and recording participants of an oral history project
- Conservation
- Sensory tours for visitors with disabilities
- Learning workshop leader for school groups
- Heritage interpretation (e.g. writing exhibition text)
- Explaining the biodiversity of your landscape
- Digitisation of archive or collection
- Online content design – website, social media
- First Aid

TREATING VOLUNTEERS APPROPRIATELY

Volunteer role descriptions can look a lot like job descriptions. They are not. Instead, they describe unpaid roles and should only describe expectations of a role. Organisations should keep appropriate boundaries between their paid staff and their volunteers, while endeavouring to ensure both are valued equally.

Be careful not to imply a volunteer is under contract to perform specific tasks. If it appears that a volunteer is being employed by your organisation, they may be eligible for full employment rights. You could also find yourself unintentionally in breach of a number of employment regulations.

To manage the risk there are several things to consider:

- Anything that could be seen as a payment for work, for example, paying expenses should be a genuine reimbursement of out-of-pocket expenses rather than a fixed amount per week
- Training offered should be linked to the role that the person is carrying out, rather than a general perk or enticement to volunteer
- Phrasing the volunteer relationship in terms of expectation rather than obligation
- Avoid language that suggests employment; a 'volunteer agreement' rather than 'contract', 'role' rather than 'job description'.

While volunteers do not have the same employment rights as staff, do make sure that volunteers are treated fairly and consistently.

Expenses

It's good and inclusive practice to pay expenses. If not, good volunteers may be excluded. Expenses should apply to all volunteers equally. There is no tax liability for out-of-pocket expenses. Expenses might include:

- Travel to and from the site
- Meals taken during 'work' time on or off site
- Care of dependents
- Postage, telephone etc.
- Travel in the course of volunteering
- Protective clothing (if needed)

How and when to pay expenses:

- Expenses should only be paid against receipts, for example bus or train tickets, or a simple form for mileage at a pre-agreed rate.
- Volunteers cannot be given a sum of money each week or month or at the end of the year. This would be classed as payment, implying that the volunteer has employee status, and is taxable.
- Some organisations offer vouchers for the café or shop to their volunteers, or provide free tea and coffee instead of repaying meal expenses.

Insurance

Employer's Liability Insurance needs to cover volunteers for the tasks that they are doing. Check that volunteers and the actions of volunteers are covered explicitly in your Public Liability Insurance, both on and off the premises.

Insurance can indemnify volunteers against being sued for damage caused to a third party. Investigate whether Personal Accident Insurance is appropriate for your volunteers. It's a good idea to make it clear if there is no such insurance; volunteers may choose to insure themselves.

If volunteers are to carry your organisation's property in their private car, check that this complies with their Motor Vehicle Insurance policy. If you are asking them to drive an organisation vehicle, you should check that they are qualified to do so.

Health and Safety

The notion of duty of care needs to be considered in all aspects of your volunteers' work and activities, even when they're volunteering for your

organisation off site, such as giving talks in libraries or supporting a partnership project.

Your organisation's Health & Safety Policy should ensure that volunteers are included, and they should be made aware of its guidance as part of their induction training (see Induction Training above).

Safeguarding

If your organisation works extensively with children, young people or vulnerable adults, you should have a safeguarding policy in place that all staff and volunteers are familiar with, and have access to. Your Safeguarding Policy should state your organisation's commitment to safeguarding, as well as the roles and responsibilities of everyone in the organisation for delivering on this commitment. The policy should clearly state that all volunteers and staff have a role to play in protecting vulnerable people from harm.

For information on Disclosure & Barring checks for volunteers, see DBS checks above.

Handling problems and complaints

Problems can arise because different priorities come to the fore, volunteers don't get the resources they think they need and money goes to a part of the organisation, other than the one they are serving. Where good support and supervision procedures are in place, problems may get solved without prolonging the difficulty.

On the other hand, a volunteer may bring a complaint about a member of staff, or vice-versa, or a client may complain about a volunteer. Volunteers need to feel complaints are handled with sensitivity and they receive a fair hearing and that the complaints/grievance procedure of the organisation will be rigorously followed. This procedure should be in writing and available to volunteers, and will ensure a consistency of response.

Letting volunteers go

You will need to be prepared to 'let go' of volunteers, as well as retain them.

Reasons some volunteers may need to be 'let go' include:

- They have volunteered in one role for a long time and run out of steam
- Their personal circumstances have changed and their commitment to the role is being affected negatively

- Some people may prove unsuitable, in spite of good recruitment procedures
- If volunteers have come via social services, often via volunteer centres, they might be on time-limited and reviewed placements. A case officer will have been allocated to that person, who can be asked to handle the moving on, especially if there are challenging or sensitive issues involved.

Knowing when to let go is as important as knowing how to retain.

Unless there has been serious misconduct, a departing volunteer should receive thanks and be offered an Exit Interview opportunity. At this interview the totality of their volunteer experience, short or long, can be evaluated and views sought from the departing volunteer about possible improvements that might be introduced for future volunteers.

Make the whole process as positive and supportive as possible, so that the departing volunteer will still feel good about your organisation and their own contribution to it. Highlight the benefits the volunteer has gained whilst volunteering with you and offer them appropriate support in seeking new opportunities (for example, the contact details for their local Volunteer Centre).

Impact assessment

Evaluation of the impact that your volunteers are having on your organisation can provide you with useful evidence for funders of volunteer programmes, and help volunteer managers to make a case for additional resources. Your organisation can carry out its own evaluation using a toolkit (see link below).

Saying 'Thank You'

After all the hard work and time involved in recruiting, training and managing your volunteers, it's only good common sense that you do everything you can to make them want to stay on. Happy volunteers feel valued and supported.

Make sure that your volunteers feel that the organisation values them and keep them inspired. Ways in which you can do this include:

- Providing free access to tea and coffee in break rooms
- Offering a continuous training programme, with qualifications if needed
- Ensuring that all members of staff are briefed about the volunteer programme so that they understand its value
- Showing them equal respect to staff
- Celebrating national Volunteers Week – perhaps a special event just for volunteers

- Working with volunteers to shape the volunteer programme, allowing them input into how they are supported
- Sharing information (e.g. if they know the visitor statistics they can see they are making a difference)

The Millennium Volunteers Scheme provides certificates to young volunteers (14-25 years) to recognise the hours of volunteering they have given. There are also local volunteer recognition schemes within most Councils for Voluntary Service; for details contact your local Volunteer Centre.

Useful links

Where to find volunteers (NCVO)

<https://knowhownonprofit.org/people/volunteers/recruiting/online>

vinspired

<https://vinspired.com>

Volunteering Matters – national charity leading research into volunteering policy and practice

<http://volunteeringmatters.org.uk>

Find your local Volunteer Centre:

<https://www.ncvo.org.uk/ncvo-volunteering/find-a-volunteer-centre>

Action on Hearing Loss (formerly RNID)

<http://www.actiononhearingloss.org.uk>

Royal National Institute for the Blind (RNIB)

<http://www.rnib.org.uk>

Age UK

<http://www.ageuk.org.uk>

Mind

<http://www.mind.org.uk>

Equality Act (2010)

<https://www.gov.uk/guidance/equality-act-2010-guidance>

Disclosure & Barring Service (DBS)

<https://www.gov.uk/government/organisations/disclosure-and-barring-service>

<https://www.gov.uk/guidance/dbs-check-requests-guidance-for-employers>

Wales Council for Voluntary Action provides a range of information sheets on all aspects of volunteering, which can be downloaded for free

<http://www.wcva.org.uk/advice-guidance/volunteers>

How to develop an inclusive supported volunteering scheme

<https://knowhownonprofit.org/how-to/how-to-develop-an-inclusive-supported-volunteering-scheme>

Working with Volunteers

<http://www.aim-museums.co.uk/downloads/cab0e6b1-dd7e-11e1-bdfc-001999b209eb.pdf>

How to choose a volunteer management system

<https://knowhownonprofit.org/how-to/how-to-choose-a-volunteer-management-system>

Understanding the drivers of volunteering (2011 – but still relevant)

http://www.gov.uk/government/uploads/system/uploads/attachment_data/file/137988/Drivers_of_volunteering_August2011.pdf

Volunteering for Wellbeing – Imperial War Museum North and Manchester Museum website with regular updates from volunteers and staff. The museums will be sharing their own learning experiences and good practice, informed by delivering socially engaging volunteer programmes in heritage settings.

www.volunteeringforwellbeing.org.uk

Ironbridge Gorge Toolkit to setting up a volunteer programme

www.ironbridge.org.uk/assets/Uploads/Ironbridge-Gorge-Museum-Trust-Volunteer-Toolkit.pdf

Nottingham Museum Trust Facebook and Twitter pages

www.facebook.com/NottmMuseumVolunteers

<https://twitter.com/NCMGvolunteer>

NCVO (formerly Volunteering England) – current advice and guidance on managing volunteers

<https://www.ncvo.org.uk/ncvo-volunteering>

Federation of Museums and Art Galleries – provide training for managing volunteers.

www.yhfed.org.uk

Association of Volunteer Managers (AVM)

<http://volunteermanagers.org.uk>

i-volunteer

<http://ivo.org>

The UK Volunteer Programme Manager Forum (UKVPM)

<https://groups.yahoo.com/neo/groups/UKVPMs/info>

Investing in Volunteers (IiV) – the UK quality standard for good practice in volunteer management

<http://iiv.investinginvolunteers.org.uk>

The Institute for Volunteering Research (IVR) have a dedicated site with completed evaluations

www.ivr.org.uk/ivr-projects/ivr-completed-projects

NCVO provides detailed guides on how to delegate, communicate, motivate and engage your team.

<https://knowhownonprofit.org/people/staff/team-communication-motivation-and-engagement>

Recruiting, selecting and inducting volunteers (Wales Council for Voluntary Action)

<http://www.wcva-ids.org.uk/wcva/1046>

Volunteer Training Bank (Museum of London)

<http://www.museumoflondon.org.uk/supporting-london-museums/resources/training-bank>

How much training to give volunteers? (NCVO)

<https://knowhownonprofit.org/people/volunteers/training/howmuch>

Accrediting volunteer learning (NCVO)

<https://knowhownonprofit.org/people/volunteers/training/accreditation>

Archives and Records Association – 2014 paper on managing volunteering in archives.

www.archives.org.uk/?view=article&id=496:ara-publishes-managing-volunteering-in-archives-&catid=9&ZItemid=6

Oral History Society – interviewer, equipment and transcription training

<http://www.ohs.org.uk>

St John's Ambulance – First Aid training

<http://www.sja.org.uk/sja/training-courses.aspx>

VocalEyes – Audio description training

<http://www.vocaley.es.co.uk/page.asp?section=92§ionTitle=We+provide+audio+description+training>

The Voluntary, Community and Social Enterprise Sector – an insurance guide for individuals and organisations

<http://blogs.ncvo.org.uk/wp-content/uploads/guest/guide-to-insurance-for-volunteers.pdf>

Guide To Insuring Your Voluntary Organisation

<https://www.ncvo.org.uk/members-area/practical-guides/quick-guides/publications/2-download-publications/P196-guide-to-insuring-your-voluntary-organisation>

Keeping volunteers safe (Wales Council for Voluntary Action)

<http://www.wcva-ids.org.uk/wcva/1069>

Health & Safety Executive – legislation on volunteers

<http://www.hse.gov.uk/contact/faqs/charities.htm>

Safeguarding and good management practices (Wales Council for Voluntary Action)

<http://www.wcva-ids.org.uk/wcva/1070>

Safeguarding for volunteer involving organisations

<https://knowhownonprofit.org/people/volunteers/keeping/ncvosafeguardingforvolunteerinvolvingorgs.pdf>

Volunteers and the Law (Wales Council for Voluntary Action)

<http://www.wcva-ids.org.uk/wcva/1081>

Volunteering: Charities and the Law (The Guardian)

<http://www.theguardian.com/society/2009/sep/03/charities-volunteers-employment-law-advice>

Managing volunteer exits (Wales Council for Voluntary Action)

<http://www.wcva-ids.org.uk/wcva/2518>

The Institute for Volunteering Research (IVR) Volunteering Impact Assessment Toolkit

<http://www.ivr.org.uk/component/ivr/volunteering-impact-assessment-toolkit-a-practical-guide-for-measuring-volunteering&qh=YToyOntpOjA7czo3OiJOb29sa2l0ljtpOjE7czo4OiJOb29sa2l0cyl7fQ==>

Volunteers Week (National event)

<http://volunteersweek.org/about>

Millennium Volunteers Scheme

<http://youngcitizens.volunteernow.co.uk/millennium-volunteers>

NCVO Members Quick Guide To Thanking Volunteers (NCVO)

<https://www.ncvo.org.uk/members-area/practical-guides/quick-guides/publications/2-download-publications/P118-ncvo-members-quick-guide-to-thanking-volunteers>